

Abstract**[0042]**

A method for a financial planning competition having at least two phases, an embodiment of the first phase including a written competition including providing a fictitious client profile to preselected teams, allowing each team thereafter to create a written financial plan based on the client profile and awarding a score. The second phase including giving high-scoring teams a revised client profile containing a change of facts to the original client profile allowing the teams to redraft the original financial plan, receiving an oral financial planning presentation from each team based upon the revised client profile for scoring and awarding a score. Any phase of the present invention may exist in a live environment or over a network, such as the Internet. The competition may also optionally include at least a third phase which is preferably styled, in one embodiment, as a game show format based on financial planning concepts.

WILDENK\PHX\1018455.4